Account Notes

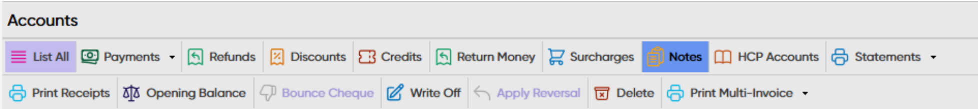
15/07/2025 12:34 pm BST

The Accounts Notes screen can be used to log any notes relating to a Client's Account.

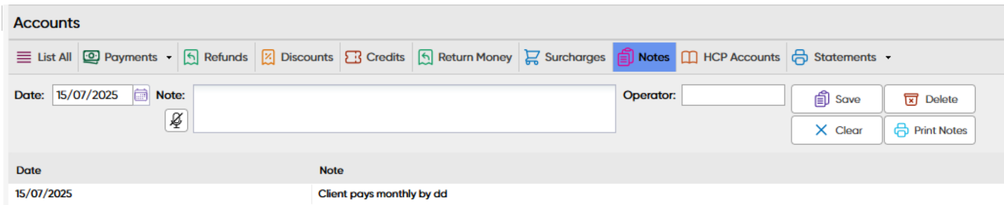
Details

Adding an Accounts Note

1. Enter the Accounts Screen.
2. Select the 'Notes' button.

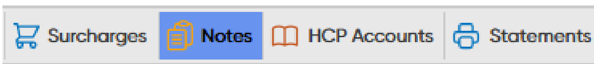


3. Write the desired notes in the 'note' box or use the voice to text feature by clicking on the microphone.
4. Enter your initials into the 'operator' box and select the 'Save' button.
5. The note will be added onto the system.



6. Users have the choice of the account note displaying in appointments within the diary via Administration > Settings > Diary and selecting 'Show Account Note in Booking'.

7. When an account note has been created, the 'Notes' icon will turn blue to indicate a note is saved.



Print Account Notes

1. Enter the Accounts Screen.
2. Select the 'Notes' button.
3. Select the 'Print Notes' button.

Deleting Account Notes

1. Enter the Accounts Screen.
2. Select the 'Notes' button.
3. Select the note you wish to delete.

4. Select the Delete button.